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HOLMES MURPHY FRATERNAL PRACTICE

EVENT PLANNING GUIDE



FIPG RISK MANAGEMENT GUIDELINES (June 2017)

The Risk Management Guidelines of FIPG include the following provisions and recommendations. These are intended to apply to all levels of membership in an organization.

ALCOHOL AND DRUGS

The possession, sale, use or consumption of ALCOHOLIC BEVERAGES, while on chapter premises or during a fraternity event, in any situation sponsored or endorsed by the chapter, or at any event an observer would associate with the fraternity, should be in compliance with any and all applicable laws of the state, province, county, city and institution of higher education, and should comply with either the BYOB or Third Party Vendor Guidelines. BYOB is defined as one (1) six-pack of 12-ounce beers or one (1) four pack of wine coolers brought by a member or guest who is legally able to consume an alcoholic beverage.

No alcoholic beverages should be purchased through or with chapter funds nor should the purchase of same for members or guests be undertaken or coordinated by any member in the name of or on behalf of the chapter. The purchase or use of a bulk quantity or common source(s) of alcoholic beverage, for example, kegs or cases, is discouraged.

OPEN PARTIES, meaning those with unrestricted access by non-members of the fraternity, without specific invitation, where alcohol is present, are not recommended. Any event with alcohol present that can or will be associated with an entity of a fraternity should require a guest list prepared 24(twenty-four) hours in advance of the event. It is recommended that a list of those who attend be maintained for several years.

No members, collectively or individually, should purchase for, serve to, or sell alcoholic beverages to any minor (i.e., those under legal drinking age).

It is recommended that the possession, sale or use of any ILLEGAL DRUGS or CONTROLLED SUBSTANCES while on chapter premises or during a fraternity event or at any event that an observer would associate with the fraternity be prohibited.

No chapter should co-sponsor an event with an alcohol distributor or tavern (tavern defined as an establishment generating more than half of annual gross sales from alcohol) at which alcohol is given away, sold or otherwise provided to those present. This includes any event held in, at or on the property of a tavern as defined above for purposes of fundraising. However, a chapter may rent or use a room or area in a tavern as defined above for a closed event held within the provisions of this policy, including the use of a third party vendor and guest list. An event at which alcohol is present could be conducted or co-sponsored with a charitable organization if the event is held within the provisions of the organization and college or university policy.

No chapter should co-sponsor, co-finance or attend or participate in a function at which alcohol is purchased by any of the host chapters, groups or organizations.

All recruitment or rush activities associated with any chapter should be non-alcoholic. No recruitment or rush activities associated with any chapter should be held at or in conjunction with a tavern or alcohol distributor as defined in this policy.

No organization or member or pledge, associate/new member or novice should permit, tolerate, encourage or participate in "drinking games." The definition of drinking games includes but is not limited to the consumption of shots of alcohol, liquor or alcoholic beverages, the practice of consuming shots equating to one's age, "beer pong," "century club," "dares" or any other activity involving the consumption of alcohol which involves duress or encouragement related to the consumption of alcohol.

No alcohol should be present at any pledge/associate member/new member/novice program, activity or ritual of the chapter. This includes but is not limited to activities associated with "bid night," "big brother – little brother" events or activities, / "big sister - little sister" events or activities, "family" events or activities and initiation.

WHAT CONSTITUTES AN EVENT?

This resource is based on the FIPG Guidelines. The goal of this document is to help you think critically around event planning. Please make sure you review the national/international risk management policy if there are additional rules or expectations around event planning.

The FIPG Guidelines apply when alcohol is present “while on chapter premises or during a fraternity event, in any situation sponsored or endorsed by the chapter, or at any event an observer would associate with the fraternity.”

Determining if the Event is on “Chapter Premises”

Is the event being hosted in your chapter house or a university-provided meeting space? **Y N**

If so, every event you host there is considered a chapter event.

Is the event being hosted in an on or off campus location where you traditionally hold your events? **Y N**

If so, events you host there would probably be considered a chapter event.

Applying the “Reasonable, Objective Observer” Standard

The following factors are considered when determining whether an event could be considered an event by a reasonable, objective observer.

Is the event being hosted or planned by one or more members of the chapter and supported by the Executive Council? **Y N**

Is the event financed by the chapter and/or being hosted on chapter property? **Y N**

Is the event being hosted or planned by one or more members and supported by members/associate/new members? **Y N**

Does the Executive Council have prior knowledge of the event? **Y N**

Is the event listed or advertised on the chapter website or social media accounts [e.g. Facebook, Twitter, etc.]? **Y N**

Do online invitations refer to the organization [e.g. Facebook events]? **Y N**

Is the event listed on a chapter calendar [public or private]? **Y N**

Will the event be announced at a chapter meeting? **Y N**

Will members of the Executive Council be in attendance? **Y N**

Will the event be marketed over the chapter listserv? **Y N**

Are members attempting to rename the event in order to give the appearance that it isn't associated with the fraternity? **Y N**

If guests were stopped on their way to the event, would they say they were going to a the “XYZ” event? **Y N**

Is the event actively or passively endorsed by a majority of the active chapter? **Y N**

Have members of the chapter lied about the event? **Y N**

9. Have contracts been signed with all Third Party Vendors? Provide Company and Contact Person(s)
- Food caterer:
 - Security guards:
 - Bus/transportation company:
 - Third party vendor:
 - University facility:
 - Hotel venue:
 - Sports field:
 - DJ:
 - Band:
 - Artist:
 - Restroom and Waste Management:
 - Other:
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HOW WILL ALCOHOL GET TO THE EVENT?

FIGP Guidelines allow chapters to host events with alcohol in one of two ways:

BYOB [Bring Your Own Beverage]

Everyone brings their own alcohol, including members, associate/new members, guests, and alumni. Use the use the BYOB worksheet [pages 6-7] to help plan your BYOB event.

Third-Party Vendor

Contract with a licensed establishment or caterer to provide a cash bar and/or a licensed location to host your event. Use the Third-Party Vendor worksheet [pages 8-9] to help plan your Third-Party Vendor event.

Dry Event

MAKING BYOB EVENTS WORK

[See [BYOB Checklist](#)]

- 1 // Are there any university or Greek Life policies that deal with BYOB events on campus? **Y** **N**
Are there any university or Greek Life policies that deal with BYOB events off campus? **Y** **N**

If so, what do those policies say? [Do they require a specific check-in procedure? Do they limit the number of drinks a guest can bring?]

- 2 // All members and guests must be "carded" at the door to verify their age. Who is checking members' and guests' IDs at the door?

- Chapter members
- Associate/new members [NOT recommended unless chapter members are also participating]
- The campus police provide someone to check IDs
- The chapter has hired a security company [see [Security Vendor Checklist](#)]

- 3 // How are you marking the guests, members, and associate/new members who are of the legal drinking age [i.e. 21 and over]?

- Wristbands that have been dated and marked for that event
- Specific hand stamp that is unique to the event
- Other [Describe]:

- 4 // How many drinks will you allow each person of legal drinking age to bring to the social event?
FIPG recommends a limit of six standard drinks per member and guest [e.g. a 6-pack of beer, 4 wine coolers, etc.].

Beer: # Wine Coolers: # Malt Beverages: # Liquor: #

- 5 // How will you manage the service distribution center [i.e. the bar]?

Where will the bar be located?

It is recommended that you establish one centralized location [not a member's room] for checking in and distributing alcohol.

Who will be assigned to work the bar?

- Chapter members
- Associate/new members
It is recommended that you do NOT assign associate/ new members to work the bar.
- The university provides someone to work the bar
- The chapter has hired a vendor to work the bar

How many sober members will be assigned to work the bar?

It is recommended that you do NOT assign associate/new members to work the bar.

How many drinks will a member or guest be permitted to take at a time?

- 6 // How will members and guests check in and collect their alcohol?

- Ticket System
 - Each member/guest is given one ticket per drink s/he checks in at the party.
 - The tickets are personalized with the type of drink the guest brings [e.g. Miller Lite, Smirnoff Ice, etc.].
 - The name of the attendee is written on the tickets.
 - The member/guest's drinks are delivered to the central bar area by a member who is working the social event.

The member/guest redeems tickets [one at a time] for his/her drinks at the bar.

Punch Card System

Each member/guest is given one punch card that has marks for each drink s/he checks in at the party.

The punch card is personalized with the type of drink the guest brings [e.g. Miller Lite, Smirnoff Ice, etc.].

The name of the member/guest is written on the punch card.

The member/guest's drinks are delivered to the central bar area by a member who is working the social event.

The member/guest's ticket is punched or marked at the bar each time s/he claims one of the drinks s/he brought.

Other [Describe]:

7 // How will you monitor that members, associate/new members, and guests are only drinking the alcohol they brought and checked in at the social event?

8 // Will leftover alcohol be discarded or made available for pick up the next day by those who brought it to the event?

PLANNING A THIRD-PARTY VENDOR EVENT

What is a Third-Party Vendor?

Examples of Third Party Vendors include bars, restaurants, catering companies, hotels, etc. Third Party Vendors are NOT individuals who work as bartenders or who are TIPS trained. A Third-Party Vendor must:

- Be licensed to sell and serve alcohol in your state, county, and/or city.
Have you obtained a copy of the license from the Vendor? **Y N**
- Have a minimum of \$1,000,000 of general liability and liquor liability insurance, and name the chapter as an additional insured, listing the chapter as a Certificate Holder.
Have you obtained a copy of the Vendor's Certificate of Insurance? **Y N**
- Agree to cash or credit, per drink sales only to individuals over the legal drinking age [i.e. a cash bar].
Have you reviewed the [FIPG Third Party Vendor Checklist](#) with the Vendor? **Y N**

Planning the Event

- 1 // Are there any university or Greek Life policies that deal with Third Party Vendor events on campus? **Y N**
Are there any university or Greek Life policies that deal with Third Party Vendor events off campus? **Y N**
If so, what do those policies say? [Do they require a particular amount of insurance? Do they limit the type of alcohol that can be purchased?]
- 2 // Have you reviewed your chapter's contract with the Third Party Vendor?
Ensure the contract is in compliance with the FIPG Guidelines and/or your National/International Risk Management Policy:
 - The contract does NOT include drink specials for members/guests as part of the room rental fee.
 - The contract does NOT include a set amount of free alcohol [e.g. 10 free pitchers, 40 free well drinks, two free drinks per member, etc.].
 - The contract does NOT require a minimum amount of alcohol sales during the event.
 - The contract does NOT provide free drinks for officers and organizers, or drink specials for all women.
- 3 // All members and guests must be "carded" at the door [and again at the time of purchase] to verify their age. Who is handling this at the door?
 - The Third-Party Vendor [Recommended]
 - The chapter has hired a security company [see [Security Vendor Checklist](#)]
 - Chapter members
 - Associate/new members [NOT recommended unless chapter members are also participating]
- 4 // How are you marking the guests, members, and associate/new members who are of the legal drinking age [i.e. 21 and over]?
 - Wristbands that have been dated and marked for that event
 - Specific hand stamp that is unique to the event
 - Other [Describe]:

5 // Most Third-Party Vendors (TPV) will have a contract they ask you to sign. The contract with the Vendor [if requested] should:

- Only be executed in the name of the undergraduate chapter [e.g. Alpha Chapter of XYZ Fraternity]. Do NOT use the national/international organization's name or the name of your local housing corporation to execute the contract.
- Contractual indemnification language should be in favor of the chapter or at a minimum it should provide mutual indemnification. Think of it this way, if you hire a catering company that is responsible to check IDs and serve alcohol, the vendor should defend the chapter if they fail to do what they were paid to do, which results in a claim or lawsuit.
- The Chapter should be added as an Additional Insured on a primary basis to each TPVs Liability and Auto. You should also obtain proof that Workers Compensation coverage is in place of their employees. This information should be verified through receipt of the actual endorsements or a Certificate of Insurance. If the TPV is being hired to provide and serve alcohol, you should also confirm they carry Liquor Liability coverage. In addition to Additional Insured status, each policy should be endorsed with a Waiver of Subrogation in favor of the Chapter.

Provide copy of all contracts and insurance information for your organization to review. You should also retain these records for a minimum of three years.

BUILDING A GUEST LIST

1 // Are there any university or Greek Life policies that limit the number of guests per member for chapter events? Y N

If so, what do those policies say?

2 // Do the math. FIPG recommends a suggested two guests per member/associate/new member at your events.

How many members and associate/new members do you plan to have at the event?

How many guests per member and associate/new member will you allow at the event?

FIPG recommends a suggested two guests per member.

This is the total number of guests you can invite to your social event.

The total number of attendees [members and guests] should not exceed fire code for your venue.

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3 // Figure out how members will add names to the guest list. [see [Building A Guest List](#)]

Spreadsheet or Sign-Up List

Create a spreadsheet and allow members to add guests' names.

Bring the list to a chapter meeting, post it online, or hang it on a bulletin board in the chapter house.

Each member and associate/new members' name should be on the list next to a blank space for each guest they're allowed to invite [e.g. two guests per member/Associate/new member].

Numbered Invitations

Distribute numbered invitations to each member/associate/new member to give to his guests.

These invitations should be printed professionally or created in a way so they can't be easily copied. Tickets cannot be sold or bartered.

Keep a list with each brother and associate/new member's name on it and the numbers of the invitations they were given.

During the event, keep a sign-in sheet at the door and write the guest's name next to the invitation number as s/he turns in the invitation.

Closed Facebook Event

Create a closed [non-recurring] event with a specific start and end time.

Do NOT allow friends to extend the guest list.

Set the Privacy to "Invite Only."

A designated brother [e.g. Risk Management Chairman] should be set as the Host and administrator for the event.

Each member/associate/new member should submit the names of guests to the Host for invitation to the event OR the Host should designate a specific period of time during which members will be given access to add guests to the event.

Other [Describe]:

4 // How many hours in advance will the guest list be closed?

It is recommended that the guest list be closed at least 24 hours prior to the event.

MANAGING THE EVENT

Theme

1 // Does the event have a theme?

Y N

If yes, what is the theme?

Event themes should NOT be disrespectful or degrading to any person or population. When selecting a theme, ensure it:

- Does NOT rely on the stereotypes of certain groups.
- Does NOT encourage offensive dress or costumes.
- Does NOT stereotype men or women.
- Is NOT sexist. If you're unsure, try interchanging the word/theme with a racial word/theme.
- Is NOT centered on making fun of a particular group of people, culture, or organization.
- Does NOT lend itself to members, associate/new members, or guests taking the theme to a place that is disrespectful or degrading.

Working the Door

1 // Who is working the door?

- Chapter members
- Associate/new members [NOT recommended unless chapter members are also participating]
- The chapter has hired a security company [see [Security Vendor Checklist](#)]
- The Third Party Vendor [see [FIPG Third Party Vendor Checklist](#)]

2 // Who is checking IDs?

- Chapter members
- Associate/new members [NOT recommended unless chapter members are also participating]
- The campus police provide someone to check IDs
- The chapter has hired a security company [see [Security Vendor Checklist](#)]
- The Third Party Vendor [see [FIPG Third Party Vendor Checklist](#)]

3 // How are you marking the guests, members, and associate/new members who are of the legal drinking age [i.e. 21 and over]?

- Wristbands that have been dated and marked for that event
- Specific hand stamp that is unique to the event
- Other [Describe]:

4 // How many entrances will there be to the party?
It is safest to only have ONE entrance to the event.

Sober Monitors [see [Sober Monitor Resource](#)]

1 // Who will your officer in charge be for the event?

2 // How many sober monitors will you have at the event?
It is recommended that you have at least one sober monitor for every 15 attendees.

- 7 // Will you select music that is NOT disrespectful or degrading to a particular group of people or culture? **Y** **N**
- 8 // Will you ensure no man-made water feature [e.g. slip-and-slide, etc.] at the event? **Y** **N**
- 9 // In compliance with the FIPG Guidelines, will you ensure there are no tables or paraphernalia within the event that are used for drinking games? **Y** **N**
- 10 // In compliance with FIPG Guidelines, will you ensure the event does NOT involve strippers, exotic dancers, or similar, whether professional or amateur. **Y** **N**

Crisis Management Plan

1 // Do you have a crisis management plan in place for the event? **Y** **N** [see [Crisis Management Plan](#)]
If yes, please describe:

2 // Will emergency services be readily available at the event? **Y** **N**

3 // Who is the officer in charge to contact emergency services?

Name/Title:

Contact Information:

4 // If the need for assistance arises, who will be responsible for contacting:

Name/Title:

Contact Information:

- Emergency personnel
- House Corporation President
- Chapter President
- Chapter Advisor
- Fraternity Headquarters
- University Officials

Educational credit goes to FIPG, Pi Kappa Phi Fraternity, Indiana University and the North-American Interfraternity Conference for portions of this resource. No portion of this resource should be used for commercial purposes.